<table>
<thead>
<tr>
<th>Breakout Session A: 10:00 – 10:50</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fireside</strong></td>
</tr>
<tr>
<td>Tawney Reader, NMLS, Senior Consumer Lender, Craft3</td>
</tr>
</tbody>
</table>
# Breakout Topics & Locations

**Breakout Session B: 11:10 – 12:00**

<table>
<thead>
<tr>
<th>Fireside</th>
<th>Bethany House</th>
<th>Lounge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Buildings Program Updates</td>
<td>Ductless Heat Pump Sizing and Heat Pumps in Manufactured Homes</td>
<td>Oregon Solar Energy Industries Association (OSEIA)</td>
</tr>
<tr>
<td>Nick Dreves, Existing Buildings Outreach Manager</td>
<td>Bruce Manclark, Director of Training, CLEAResult</td>
<td>Kyle Diesner and Andrew Shepard</td>
</tr>
</tbody>
</table>
Who is here this morning?
Grants Pass
Energy Trust Highlights
Spring Trade Ally Forums
April 2018
2017 Accomplishments: Statewide

- **64.3 aMW saved**
  - Most savings to date

- **6.8 million annual therms saved**
  - Ties most savings to date

- **4.42 aMW renewable energy generated**

- **$102 million+ incentives paid**

- **56,000 sites served**
2017 Accomplishments: Josephine, Jackson and Douglas Counties

- More than $6.5 million incentives paid
- 5,300 total sites
- 39M kWh saved
- 304K therms saved
2018: What’s Ahead

• New-and-improved Find-a-Contractor tool
• Trade ally survey
Growth Areas

• Small business sector:
  • Small sites = >20,000 sq. ft.
  • 32 percent have worked with Energy Trust
  • 70 percent of small sites unserved

• Large business sector:
  • 30 percent remaining market share

• Medium business sector:
  • 46 percent remaining market share
Mike Colgrove
Executive Director,
Energy Trust of Oregon
Trade ally forums
2017 Residential Home Retrofit & EPS™ New Construction
2017 Home Retrofit Drivers: Electric

- **2015**
  - 74% HVAC
  - 6% Water heating
  - 12% Weatherization
  - 7% Windows

- **2016**
  - 73% HVAC
  - 4% Water heating
  - 16% Weatherization
  - 7% Windows

- **2017**
  - 74% HVAC
  - 9% Water heating
  - 10% Weatherization
  - 7% Windows
2017 Drivers: Gas

- 2015:
  - Gas fireplace: 35%
  - HVAC: 15%
  - Weatherization: 17%
  - Windows: 30%

- 2016:
  - Gas fireplace: 23%
  - Gas fireplace ignition: 17%
  - HVAC: 19%
  - Weatherization: 10%
  - Windows: 30%

- 2017:
  - Gas fireplace: 16%
  - Gas fireplace ignition: 24%
  - HVAC: 27%
  - Weatherization: 7%
  - Windows: 25%
EPS Market Share

<table>
<thead>
<tr>
<th>Year</th>
<th>EPS Homes</th>
<th>OR Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2,521</td>
<td>25%</td>
</tr>
<tr>
<td>2016</td>
<td>3,335</td>
<td>35%</td>
</tr>
<tr>
<td>2017</td>
<td>3,096</td>
<td>30%</td>
</tr>
</tbody>
</table>

EPS homes and OR market share chart showing growth over the years.
Southern Oregon Trends
Home Retrofit – Southern Oregon (projects)

- Ductless heat pump
- Gas furnace
- Heat pump upgrade
- Air sealing
- Windows
- Insulation
- Heat pump replacement
- Heat pump advanced controls
- Gas fireplace
- Heat pump water heater
Home Retrofit – Southern Oregon (savings)

Southern OR Elec. Measures
- Ductless heat pump: 1,000,000 kWh
- Heat pump replacement
- Heat pump upgrade
- Heat pump commissioning
- Insulation
- Duct sealing
- Windows
- Heat pump advanced controls

Southern OR Gas Measures
- Gas furnace: 22,000 therms
- Windows
- Insulation
- Duct sealing
- Air sealing
Number of Homes by % improvement and home configuration: Southern Oregon
2018 Priorities
2018 Priorities

• Expand Participation
  • Targeted Marketing
• New Opportunities: Manufactured Homes
• Efficient Controls
• Supply-Chain Offerings
Multifamily Prescriptive Incentive Trends

1,804 prescriptive projects in 2017
$1.7M prescriptive incentives paid
2017 Existing Multifamily Savings

### Prescriptive Electric Savings

- **Appliances**: 87,648 kWh
- **Water Heaters**: 109,785 kWh
- **Insulation**: 168,357 kWh
- **Windows**: 1,369,178 kWh
- **HVAC**: 2,371,803 kWh

Total: 16,052,407 kWh

### Prescriptive Gas Savings

- **Insulation**: 1,834 therms
- **Appliances**: 2,073 therms
- **Windows**: 5,730 therms
- **HVAC**: 8,250 therms
- **Water Heaters**: 13,774 therms
- **Boilers**: 80,190 therms

Total: 181,642 therms

### 2017 Electric Savings by Track

- **Lighting**: 39%
- **Direct Install**: 33%
- **Prescriptive**: 25%
- **Custom**: 3%

Total: 16,052,407 kWh

### 2017 Gas Savings by Track

- **Prescriptive**: 62%
- **Direct Install**: 24%
- **Custom**: 14%

Total: 181,642 therms
2017 Prescriptive Incentives
Southern Oregon

- 2017 Avista gas addition provides opportunity for gas measures
- Additional offerings: direct install, custom incentives, walkthroughs
2018 Priorities
2018 Priorities

• Expand participation across all territories served by Energy Trust
• Enhance relationships with trade allies, distributors and manufacturers
• Optimize program offerings to provide actionable services to participants and trade allies
• Utilize data driven tools to identify areas of targeted outreach
• Seek new savings opportunities by conducting field tests and pilots
Thank you
Kate Scott, Existing Multifamily Program Manager
kate.scott@energytrust.org
ADDITIONAL SLIDES
Multifamily Electric Savings – Statewide

2017 Electric Savings by Track

<table>
<thead>
<tr>
<th>Track</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td>3%</td>
</tr>
<tr>
<td>Direct Install</td>
<td>33%</td>
</tr>
<tr>
<td>Lighting</td>
<td>39%</td>
</tr>
<tr>
<td>Prescriptive</td>
<td>25%</td>
</tr>
</tbody>
</table>

Total: 16,052,407 kWh

Incentives paid for prescriptive electric projects in 2017: $3,250,301

Prescriptive electric projects in 2017: 2790
Multifamily Gas Savings – Statewide

2017 Gas Savings by Track

<table>
<thead>
<tr>
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<th>Percentage</th>
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<tr>
<td>Custom</td>
<td>14%</td>
</tr>
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<tr>
<td>Prescriptive</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>181,642 therms</strong></td>
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</table>

Incentives paid for prescriptive gas projects in 2017: $592,807

Prescriptive gas projects in 2017: 611
2017 Prescriptive Savings - Statewide

<table>
<thead>
<tr>
<th>Category</th>
<th>kWh</th>
</tr>
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<tbody>
<tr>
<td>Appliances</td>
<td>87,648</td>
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<tr>
<td>Water Heaters</td>
<td>109,785</td>
</tr>
<tr>
<td>Insulation</td>
<td>168,357</td>
</tr>
<tr>
<td>Windows</td>
<td>1,369,178</td>
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<tr>
<td>HVAC</td>
<td>2,371,803</td>
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<td>13,774</td>
</tr>
<tr>
<td>Boilers</td>
<td>80,190</td>
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Prescriptive Incentives - Statewide

Top Prescriptive Measures 2017

- Ductless heat pumps – 1, 1.5 & 2 ton
- Windows – stacked structure single pane
- Condensing boiler
- Condensing tank water heater

Prescriptive projects submitted in 2017

3401
2015-2017 Incentives by sector – Statewide

Top Measures 2015-2017
1. Windows
   • $2,023,350
2. HVAC
   • $1,637,750
3. Boilers
   • $512,231
Incentives by Market Sector 2015-2017

- Market Rate: 52%
- Condo/Townhouse: 14%
- Affordable: 14%
- HOA: 12%
- Assisted Living: 6%
- Campus Living: 2%
Southern Oregon
Prescriptive Electric Savings – Southern OR

- **2015**:
  - Other: 10,000
  - HVAC: 150,000
  - Insulation: 400,000
  - Water Heaters: 100,000
  - Windows: 10,000
  - Total: 167,724

- **2016**:
  - Other: 10,000
  - HVAC: 850,000
  - Insulation: 400,000
  - Water Heaters: 100,000
  - Windows: 10,000
  - Total: 856,959

- **2017**:
  - Other: 10,000
  - HVAC: 400,000
  - Insulation: 400,000
  - Water Heaters: 100,000
  - Windows: 10,000
  - Total: 220,391
Prescriptive Gas Savings – Southern OR

<table>
<thead>
<tr>
<th>Year</th>
<th>Gas Savings (Therms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>-</td>
</tr>
<tr>
<td>2016</td>
<td>125</td>
</tr>
<tr>
<td>2017</td>
<td>3,106</td>
</tr>
</tbody>
</table>
2015-17 Incentives by sector – Southern OR

Top Measures 2015-17
1. HVAC  
   • $241,163
2. Windows  
   • $73,413
3. Water Heaters  
   • $9,550